



# USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/27 thru 07/03.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Jun 27, 2014

## NATIONAL SUMMARY

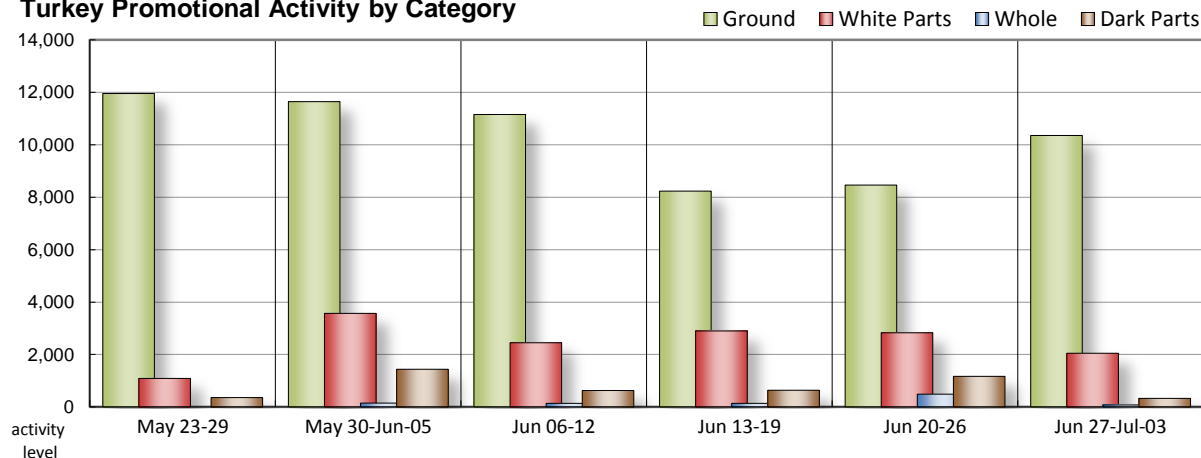
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate <sup>1/</sup>	29.9% of 22,900 outlets		37.3% of 22,900 outlets		41.5% of 23,200 outlets	
Special Rate <sup>4/</sup>	0.9%		1.5%		9.9%	
Activity Index <sup>2/</sup>	13,650		13,880		12,000	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
<b>WHOLE BIRDS:</b>						
Fresh - Hens						
" - Toms						
Frozen - Hens	40	1.34	420	1.19	140	1.07
" - Toms	40	1.34	70	1.26	130	1.08
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole					40	2.29
Fresh					1,530	1.50
Frozen	540	1.80	280	1.67		
Split, bone-in						
Fresh			290	2.99		
Rotisserie	140	8.99	40	7.49	120	7.16
Boneless, whole					10	4.99
Cutlets	660	4.79	960	4.72	430	4.62
Cutlets, thin sliced						
Strips						
Tenders	240	4.99	420	4.48	200	4.03
Marinated Tenders	470	4.32	840	4.08	240	4.26
Drumsticks	40	1.69	220	1.71	250	1.88
Thighs			90	1.78	40	2.29
Wings	100	2.48	40	1.79	230	1.91
Necks			20	1.93	10	1.29
Smoked Drumsticks	100	2.89	310	2.68	70	1.82
Smoked Wings	90	2.99	320	2.48	70	1.82
Smoked Necks			170	2.21		
<b>GROUND TURKEY:</b>						
Patties	10,350	3.38	8,460	3.34	7,200	3.13
Sausage	2,400	3.55	1,310	3.69	970	3.41
85% lean	2,670	3.31	1,900	3.57	1,520	3.41
93% lean	1,400	2.85	2,410	2.71	1,630	2.66
Breast	3,040	3.23	2,130	3.36	2,890	3.12
Rolls (frsh/frz 1 lb.)	840	4.47	710	4.46	190	4.01
Specialty <sup>5/</sup>	640	3.10	160	2.53	590	2.02
Patties	30	4.00	150	4.56	430	5.00
93-94% lean	160	4.45	570	4.26	260	4.04
Breast	10	6.49	50	6.59	10	6.99

Note: rolls & specialty not included in ground turkey total and weighted average.

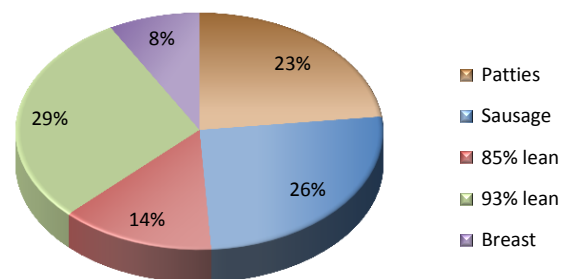
## This Week's Turkey Feature Highlights

Retail feature activity slows on turkey and deli items going into the end of the month. Limited offerings of frozen hens and toms are at higher prices. Featuring increases on frozen bone-in whole breasts; prices are higher. Rotisserie breasts are showing up in a few more circulars, but offerings are still light. This week no one seems to be interested in featuring fresh split breasts. Fewer stores are placing white parts in their ad pages; prices are higher. Shoppers looking for dark parts will only find a limited number of ads on fresh and smoked drums and wings; prices are mostly higher. Ground turkey is finally getting more space in this week's ads; the weighted average price is higher due to fewer promotions on 85% lean. Although more stores are showing ads for deli items, feature activity is lower. Service deli featuring declines due to fewer stores promoting thin slicing turkey and thick slicing chicken. Offerings increase on self-service deli as stores offer more processor brands. Prices are lower on processor brands, higher on private brands. The Fourth of July is on a Friday this year, giving people a three day weekend to enjoy the festivities.

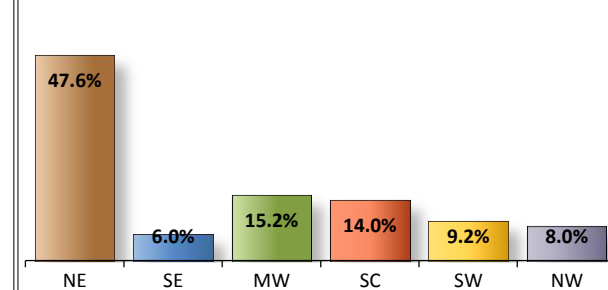
## Turkey Promotional Activity by Category



## Ground Turkey Featuring by Type



## Relative Feature Activity by Region



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

**1/ Feature Rate:** the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.). **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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Fri. Jun 27, 2014

	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
<b>Special Rate</b> <sup>4/</sup>	<b>58.8% of 4,700 sampled outlets</b>			<b>13.0% of 5,900 sampled outlets</b>			<b>30.7% of 4,200 sampled outlets</b>		
<b>Activity Index</b> <sup>2/</sup>	<b>0.0% of stores w/ no-price promotions</b>			<b>0.0% of stores w/ no-price promotions</b>			<b>0.0% of stores w/ no-price promotions</b>		
	<b>Activity Index = 7,180</b>			<b>Activity Index = 1,230</b>			<b>Activity Index = 2,080</b>		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens									
" - Toms									
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.57	20	1.57	1.19 - 1.48	50	1.43	1.28 - 1.99	50	1.60
Split, bone-in									
Fresh									
Rotisserie	8.99	10	8.99						
Boneless, whole									
Cutlets	3.99 - 4.99	390	4.95	4.99	40	4.99	4.49	180	4.49
Cutlets, thin sliced									
Strips									
Tenders	4.99	160	4.99	4.99	40	4.99			
Marinated Tenders	4.26 - 4.99	380	4.47	3.73	80	3.73	3.73	10	3.73
Drumsticks	1.79	20	1.79				1.49 - 1.69	20	1.58
Thighs									
Wings	1.79 - 2.99	60	2.61	2.99	20	2.99	1.49 - 1.69	20	1.58
Necks									
Smoked Drumsticks							1.99	10	1.99
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	2.50 - 4.48	1,690	3.57	2.50 - 4.00	380	3.22	2.99 - 3.99	240	3.92
Sausage	2.39 - 3.99	2,140	3.32	3.69	20	3.69	2.86 - 3.69	330	3.27
85% lean	2.00 - 3.49	690	3.05	2.00 - 2.66	140	2.54	2.00 - 2.99	160	2.46
93% lean	2.30 - 4.22	1,190	3.19	2.73 - 3.50	410	3.08	2.79 - 3.99	700	3.14
Breast (99-100% lean)	4.61	160	4.61	3.99 - 4.61	40	4.51	3.99 - 4.99	160	4.13
Rolls (frsh/frz 1 lb.)	2.66	110	2.66	2.99	10	2.99	2.99	180	2.99
<b>Specialty</b> <sup>5/</sup>									
Patties	4.99	10	4.99				3.50	20	3.50
93-94% lean	3.99 - 4.99	150	4.37						
Breast									



# USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/27 thru 07/03.

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Fri. Jun 27, 2014

	SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate <sup>1/</sup>	22.5% of 4,200 sampled outlets			29.1% of 2,800 sampled outlets			24.6% of 1,200 sampled outlets		
Special Rate <sup>4/</sup>	0.0% of stores w/ no-price promotions			7.8% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 1,920			Activity Index = 910			Activity Index = 330		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens	1.19	20	1.19	1.49	20	1.49			
" - Toms	1.19	20	1.19	1.49	20	1.49			
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.47 - 1.69	100	1.54	1.99	280	1.99	1.98	40	1.98
Split, bone-in									
Fresh									
Rotisserie				8.99	130	8.99			
Boneless, whole									
Cutlets	4.49	50	4.49						
Cutlets, thin sliced									
Strips									
Tenders	4.99	40	4.99						
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks	2.99	90	2.99						
Smoked Wings	2.99	90	2.99						
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	3.59 - 3.99	90	3.67						
Sausage	3.00 - 3.35	160	3.16				4.39	20	4.39
85% lean	2.39 - 2.99	350	2.82	2.39	40	2.39	2.39	20	2.39
93% lean	2.99 - 3.99	410	3.54	3.19 - 3.60	120	3.24	3.19 - 3.99	210	3.44
Breast (99-100% lean)	3.99 - 4.99	370	4.58	3.99 - 4.95	70	4.43	3.99 - 4.79	40	4.29
Rolls (frsh/frz 1 lb.)	2.99	130	2.99	3.50	210	3.50			
<b>Specialty <sup>5/</sup></b>									
Patties									
93-94% lean				5.59	10	5.59			
Breast				6.49	10	6.49			



# USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/27 thru 07/03.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Jun 27, 2014

	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate <sup>1/</sup>	68.8% of 22,900 stores		63.9% of 22,900 stores		77.7% of 23,200 stores		85.1% of 4,700 sampled outlets			79.6% of 5,900 sampled outlets		
Activity Index 2/	37,650		42,970		45,720		Activity Index = 12,860			Activity Index = 9,780		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	4,820	8.06	4,740	8.33	3,480	8.35	6.98 - 9.99	1,530	8.26	6.99 - 9.99	1,460	7.19
Private Brand	3,530	7.45	1,950	8.22	2,100	7.44	6.98 - 9.49	2,820	7.36	7.99	210	7.99
<b>Category 2</b>												
Processor Brand	3,620	5.84	3,120	6.04	5,180	5.71	4.99 - 7.99	1,640	5.90	4.99 - 6.99	250	6.20
Private Brand	1,070	5.75	5,900	7.13	3,550	6.77	4.99 - 6.99	240	5.92	5.98 - 5.99	250	5.98
<b>Category 3</b>												
Processor Brand	700	4.40	980	3.92	1,050	3.94	3.99 - 4.99	160	4.30	4.38 - 4.49	80	4.46
Private Brand	220	5.07	20	3.88	140	4.95	4.48 - 5.48	220	5.07			
<b>Turkey Ham</b>												
Processor Brand	390	4.33	200	4.04	270	3.56	3.49 - 4.79	310	4.49			
Private Brand			60	4.63								
<b>Turkey Pastrami</b>												
Processor Brand	320	3.97	30	4.32	110	4.23	3.79 - 4.59	280	3.97			
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	1,950	8.44	3,880	7.61	3,960	7.32	5.98 - 9.99	1,420	8.63	7.99 - 8.99	70	8.90
Private Brand	390	7.39	2,460	7.48	1,330	7.19	6.99 - 7.98	220	7.52			
<b>Category 2</b>												
Processor Brand	80	5.00	80	5.90	470	5.89						
Private Brand	170	5.92	440	6.15	20	4.69						
<b>SELF-SERVICE DELI</b>												
(dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	9,540	3.14	8,080	3.40	9,500	3.01	2.49 - 4.00	1,850	3.27	2.49 - 4.00	3,690	3.07
Private Brand	910	2.98	810	2.83	2,590	2.96	2.99 - 3.50	300	3.10	2.33 - 3.50	150	2.84
<b>Turkey 16 oz</b>												
Processor Brand	1,260	5.51	1,780	5.25	320	4.48	4.69 - 5.99	190	5.07	4.99 - 6.99	260	6.83
Private Brand			110	5.58								
<b>Chicken 7-10 oz</b>												
Processor Brand	7,810	3.23	7,470	3.43	9,060	3.03	2.50 - 4.00	1,380	3.32	2.50 - 4.00	3,250	3.15
Private Brand	870	3.00	860	2.88	2,590	2.96	2.99 - 3.50	300	3.10	2.79 - 3.50	110	2.99

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate <sup>1/</sup>	71.5% of 4,200 sampled outlets			49.7% of 4,200 sampled outlets			43.7% of 2,800 sampled outlets			64.8% of 1,200 sampled outlets		
Activity Index <sup>2/</sup>	Activity Index = 7,100			Activity Index = 4,020			Activity Index = 1,990			Activity Index = 1,900		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	6.49 - 10.99	510 8.48		6.99 - 8.99	420 8.53		7.49 - 9.99	390 9.42		6.99 - 12.99	510 8.08	
Private Brand	6.99 - 10.99	110 7.99		6.49 - 8.49	390 7.65							
<b>Category 2</b>												
Processor Brand	4.94 - 7.58	1,220 5.92		4.99 - 6.49	150 5.76		4.99	330 4.99		5.99	30 5.99	
Private Brand	4.99 - 6.99	540 5.54		5.99	40 5.99							
<b>Category 3</b>												
Processor Brand	2.79 - 4.99	330 4.58		3.99 - 4.38	90 4.03					3.99	40 3.99	
Private Brand												
<b>Turkey Ham</b>												
Processor Brand	3.49 - 3.98	30 3.77					2.89 - 3.79	50 3.68				
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	2.99 - 3.98	30 3.62								4.99	10 4.99	
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.99 - 9.49	170 6.86		7.99 - 9.99	180 8.77		7.99 - 8.49	20 8.21		6.99 - 11.99	90 7.51	
Private Brand	6.98 - 7.99	150 7.11		7.99	20 7.99							
<b>Category 2</b>												
Processor Brand	3.99 - 5.79	80 5.00										
Private Brand	5.49 - 5.99	170 5.92										
<b>SELF-SERVICE DELI</b>												
(dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	1.98 - 3.99	1,690 2.83		2.19 - 2.69	1,200 3.09		2.49 - 3.99	600 3.72		2.19 - 3.99	510 3.57	
Private Brand	2.50 - 3.50	240 2.77		2.79 - 3.29	120 2.81					3.49	100 3.49	
<b>Turkey 16 oz</b>												
Processor Brand	4.99 - 5.99	390 5.50		3.98 - 6.00	400 4.90		4.99	20 4.99				
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	1.98 - 3.99	1,200 2.97		2.19 - 2.99	890 3.18		3.50 - 3.99	580 3.76		2.19 - 3.99	510 3.57	
Private Brand	2.50 - 3.50	240 2.77		2.79	120 2.79					3.49	100 3.49	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)